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Developing Electronic Questionnaires at Statistics Canada

Issues and Challenges for Questionnaire Design

QUEST April 2011
Granada, Spain

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Overview

- New E-questionnaire project

- Objectives

- Roles & responsibilities

- Developing guidelines for E-questionnaires

- Some issues and challenges

A new approach

- Part of an overall corporate initiative

- Reassessment of electronic data collection at Statistics Canada

- Incorporate E-questionnaires in mainstream operations

- Project approved & initiated in 2010

A new approach (continued)

- Surveys designed to make E-questionnaire:
  - principal mode of collection
  - first step in sequential multi-mode environment

- 130 business & household surveys to be deployed over next 5 years

Business questionnaires - profile

- Data collection traditionally conducted using paper questionnaires
  - Mail-out mail-back … (facsimile, spreadsheet…)
  - CATI follow-up

- No specific design standards for paper instruments

- **New model**: Surveys specified according to generic functionalities

Central elements

- Electronic Questionnaire Generation System (EQGS)
  - Cornerstone of the technical platform
  - Custom built by Statistics Canada
  - Generates E-questionnaires from input specifications

- Input processes
  - Consultation with subject matter areas
  - E-questionnaire guidelines

- Overall deployment schedule

Overview of deployment process

Consultation & specification

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EQGS functionalities
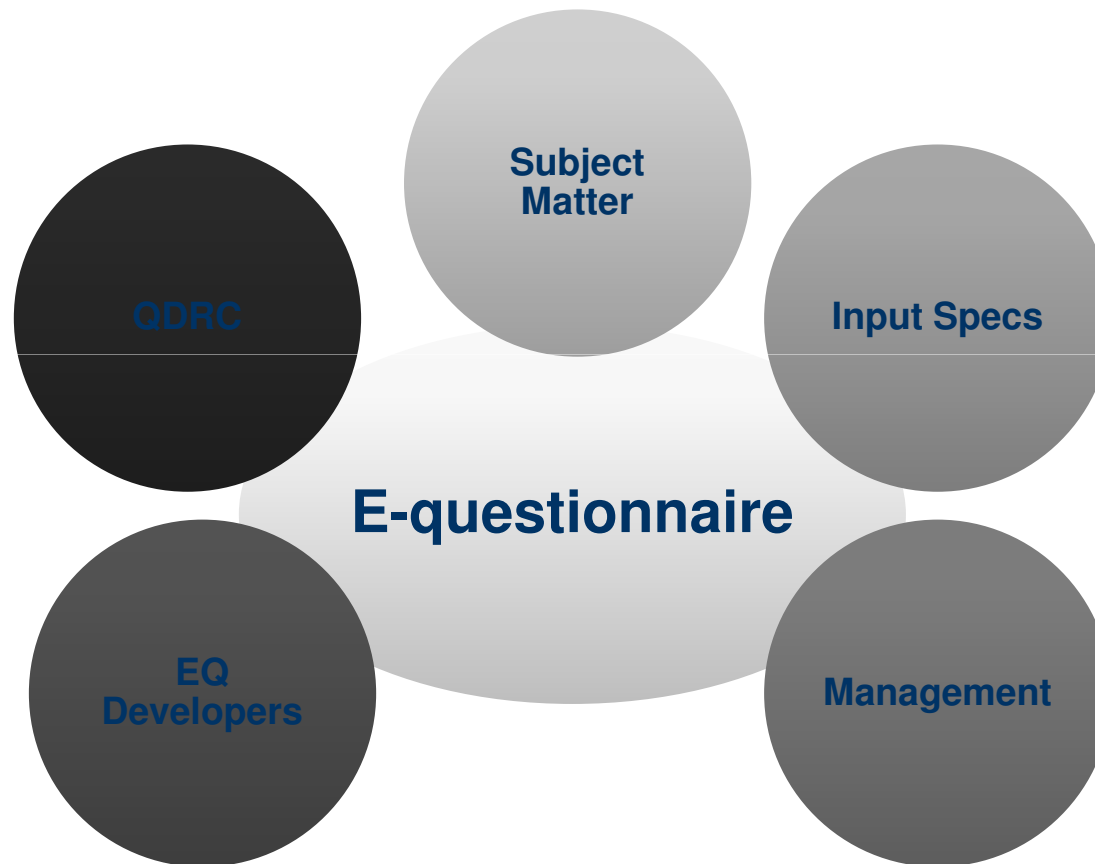
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Build & test E-questionnaire

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Data Collection

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Post-mortem

Collection partners

E-Questionnaire Guidelines

- *EQ Standards Committee* established in 2010

- Proposed guidelines formulated based on:
  - existing practices and testing
  - external documentation and literature

- **Principal focus**: design features
  (e.g., navigation, usability, accessibility, etc.)

- **Out-of scope**: "Traditional" components of questionnaire design

E-questionnaire Guidelines (continued)

- First document drafted- April 2011
  - currently under internal review

- Living document
  - To evolve in contolled & deliberate fashion

Guidelines: in-scope elements

- Common Look and Feel (CLF)
- Consistent use of colour (B/W)
- Fonts and styles
- Consistency of tool bars
- Navigation keys & buttons (functionality & placement)
- Movement and skip functions
- Survey window interface
- Answer space placement & selection
- Question placement
- Instructions
- Character limitations
- Message displays
- Generic contact information and introduction page
- Session time outs
- Browsing & printing
- Functionalities for negative values, decimals and thousands ($)

Guidelines: out of scope ... currently

- Survey-specific content such as:

  - Question content, structure, wording

  - Instructions

  - Transitions

  - E-mail correspondence

  - Help content

Project status

- Seven (7) business surveys began e-collection in March 2011
  - based on new model

- Four business and two agricultural surveys scheduled for usability testing
  - May-July 2011

Some issues and challenges

- Ambitious deployment schedule

- 'Cultural shift' for subject matter areas
  - Specification process
  - Managing expectations
  - Impact of EQ guidelines

- Communication

- Questionnaire content development
  - Content review & earlier involvement
  - Establishing & implementing guidelines for traditional elements of QD
  - Presentation across modes
  - Paper ➔ EQ ?

Some issues and challenges

- Technical changes

  - Functionalities

  - Survey-specific idiosyncrasies

  - Survey deployment on evolving platforms (migrating)

- Planning and implementing usability testing

  - More players and steps involved

  - Ability to end-user test in E-questionnaire environment

  - Adequate time for reporting results and implementing change

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Questionnaire Design Resource Centre

- An integral role in future question design guidelines

- Become involved earlier with EQ content and specifications

- Communicate & incorporate findings into 'EQ guideline process'

- Develop & foster in-house testing strategies

- Keep apprised of ongoing research and developments by our international colleagues

Good visual design will not fix a poorly written question, and a well-written question can be misinterpreted or ignored due to bad visual design

(Morrison, Dillman, Christian, JOS,2010)

For more information

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